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ABSTRACT

After years of struggling with increasing student enrollments, the Elk Grove Unified School District (Sacramento County, California) conducted two $70 million bond elections to supplement State funding for new schools, improve existing schools, and provide transportation and student support facilities. The 1986 election failed with 64.8 percent voter approval, whereas the 1987 election passed with 74.8 percent voter approval. This report describes how Elk Grove learned from the first election and revised its campaign to pass the second bond election by a three-to-one margin. After describing the district's growth problem and its $285 million needs (including 21 new schools by 1995), the report explains the use of partnership funding to provide maximum state funding for new schools as a first priority, supplemental new school funding from the local bond issue where state funding was inadequate, and district funding for needs not covered by state monies. The Elk Grove tax plan levied a maximum tax rate of $3.82 per month for existing homes and $9.82 per month for new homes. (Attempting to finance all district needs solely with a local bond issue would have produced an excessive tax rate.) Before considering a bond issue, the district exhausted other approaches, such as increasing class size (to qualify for state aid); year-round scheduling; and using portables, busing, double sessions, and other options. Subsequent sections cover planning, organizing, and public relations aspects of a high-profile, successful campaign. Conclusions are also presented. The key to success is community involvement. (MLH)

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ELK GROVE UNIFIED SCHOOL DISTRICT

Need Two-Thirds To Pass? (No Worries!)

The planning and execution of the Elk Grove Unified School District's successful 1987 school improvement bond election.

Presented at the 1987 Annual Conference of
California School Boards Association

in conjunction with
Association of California School Administrators

San Francisco
December 10, 1987

EA 019 956

ELK GROVE UNIFIED SCHOOL DISTRICT
8820 ELK GROVE BOULEVARD
ELK GROVE, CALIFORNIA 95624

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NEED TWO-THIRDS TO PASS?
(NO WORRIES!)

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Prepared By

Vern Chang
Gil Albiani

NEED TWO-THIRDS TO PASS?
(NO WORRIES!)

A. INTRODUCTION

After years of struggling to house a rapidly growing student body, the Elk Grove Unified School District conducted two $70 million bond elections to supplement State funding for new schools, improve existing schools, and provide transportation and student support facilities.

The first election in 1986 failed with voter approval of 64.8%, just shy of the two-thirds majority needed for a new tax. The second election in 1987 passed with voter approval of 74.8%.

This report describes how Elk Grove learned from the first election and revised its campaign to pass the second bond election with a slam-dunk victory by a margin of 3-to-1.

B. THE GROWTH PROBLEM

The Elk Grove Unified School District is located south of Sacramento City, serves a geographic area of 320 square miles in Sacramento County, and serves a population of 20,000 students with 27 schools. (See Figure 1)

Elk Grove is experiencing a rapid growth in student enrollment caused by the Echo Boom in birth rates coupled with the rapid development of vacant lands that are available in south Sacramento County. The rate of growth is as follows:

- Housing has increased from 17,384 homes in 1975 to 35,370 homes in 1986 and is expected to more than double to 85,470 homes by the year 2000. As of 1987, the City and County has approved 39,400 units for development within the Elk Grove district boundaries. (See Figure 2)

- Student enrollment has increased from 10,780 students in 1975 to 20,000 students in 1987 and is expected to more than double to approximately 43,443 students by the year 2000. (See Figure 2)

C. THE DISTRICT'S NEEDS

To accommodate student enrollment growth through 1995, the following district needs have been identified:

1. 21 New Schools will be needed by 1995 at an estimated cost of $247,800,000 (See Figure 2).

2. Existing Schools will require site improvements to (1) increase capacities to their maximum, (2) provide needed facilities such as multipurpose rooms, libraries, furniture and equipment, (3) complete development of the sites, (4) continue participation in the Deferred Maintenance Program (State Match), and (5) remove the remaining non-friable asbestos in 11 of the 27 school sites. The total estimated cost is $26,200,000 (See Figure 3).

3. Transportation will require the purchase of 130 new and replacement buses and vans by 1995. The estimated cost is $6,200,000 (See Figure 3).

4. Student Support Facilities will be required to meet the corresponding growth in transportation, warehouse, maintenance and district office needs. The estimated cost is $5,300,000 (See Figure 3).

Overall, the district's total construction, equipment and acquisition dollar needs through the year 1995 is $285,500,000 (See Figure 3).

Figure 1
ELK GROVE DISTRICT BOUNDARIES

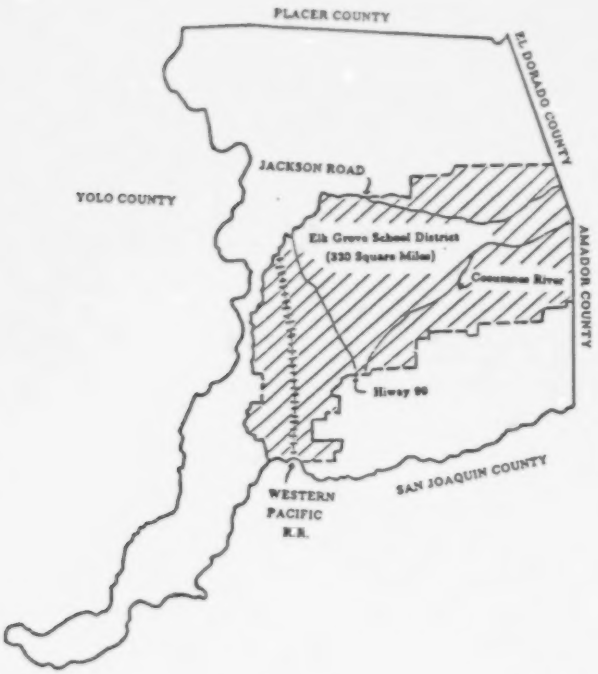


Figure 2
ELK GROVE GROWTH SUMMARY

FISCAL YEAR	HOMES	STUDENTS	SCHOOLS	COST
1975	17,384	10,780	19	
1986	35,370	18,228	26	(N/A)
1987		20,000*	26 + 1**	
PROJECTIONS				
1995	+27,610	+11,857	+21	$ 247.8 M
2000	+22,490	+11,586	+12	$ 237.0 M
TOTALS	85,470	43,443	59	$ 485.0 M

*Permanent Capacity is 14,347

**1 Portable Hop Scotch School

D. THE NEED FOR PARTNERSHIP FUNDING

1. A Tax Rate That Passed

Elk Grove's voters passed a tax plan that levied a maximum tax rate of $3.82 per month for existing homes and $9.82 per month for new homes. These maximum tax rates were established after several community surveys indicated that (1) voter approval would diminish significantly below the two thirds level if the tax rate exceeded $4.00 per month for existing homes, and (2) developer support would turn to opposition if the tax rate exceeded $10.00 per month for new homes.

2. A Tax Rate That Wouldn't Pass

To finance all of the $285,500,000 in district needs through 1995, solely with a local bond issue, would have resulted in a minimum tax rate of $27.00 per month ($324.00 annually) for existing homes and $69.00 per month ($828.00 annually) for new homes. The community and developer survey data indicates that these tax rates would have guaranteed failure of the bond election.

3. The Partnership

With this in mind, Elk Grove (1) sought maximum State funding (including developers fees) for new schools as a first priority, (2) provided supplemental funding from the local bond issue for new schools where State funding was inadequate to complete the schools (50% for site development, 50% for furniture and equipment, and local district additions), and (3) provided funding for district needs that would not be met by State funding (existing school additions/improvements, transportation, asbestos, deferred maintenance, and student support facilities). The proposed sharing of costs is as follows:

District Need	State/Developer Fees *		District Funds	
New Schools (21)	$233,000,000	(94%)	$14,800,000	(6%)
Existing Schools (23)	10,600,000	(50%)	10,600,000	(50%)
Deferred Maintenance	2,000,000	(50%)	2,000,000	(50%)
Asbestos Removal	-0-	(0%)	1,000,000	(100%)
Buses	-0-	(0%)	6,200,000	(100%)
Student Support	-0-	(0%)	5,300,000	(100%)
Overall Total	$245,600,000	(84%)	$39,900,000	(16%)

*** A MAJOR CAVEAT**

Any project dependent on state funding will be delayed if:

1. The 1986 state bond funding source is exhausted.
2. The 1988 State bond funding is inadequate.
3. The 1988 State bond issue fails to pass.
4. The State changes its priority funding system.

Figure 3
THE PARTNERSHIP IN FUNDING

DISTRICT NEED	FUNDING SOURCE (% SHARE)		
	STATE*	DISTRICT	TOTAL
1. 21 NEW SCHOOLS	$233.0 M (94%)	$14.8 M (6%)	$247.8M
2. 23 EXISTING SCHOOLS	$ 10.6 M (50%)	$10.6 M (50%)	$ 21.2 M
3. DEFERRED MAINTENANCE	$ 2.0 M (50%)	$ 2.0 M (50%)	$ 4.0 M
4. ASBESTOS	-0-	$ 1.0 M	$ 1.0 M
5. BUSSES	-0-	$ 6.2 M	$ 6.2 M
6. STUDENT SUPPORT	-0-	$ 5.3 M	$ 5.3 M
TOTALS	$245.6 M (86%)	$39.9 M (14%)	$285.5M

*Projects dependent on State Funding are subject to delays if the:

(1) 1986 Bond funds are exhausted
(2) 1988 Bond issue is inadequately sized
(3) 1988 Bond Issue fails to pass
(4) Priority funding system is changed

E. BEFORE ASKING FOR TAX DOLLARS (See Figure 4)

Before asking the voters to approve a bond issue, Elk Grove felt an obligation to put on a "Full Court Press" and exhaust all other housing options that were available to the district:

1.	State Funding	To qualify for state funding, it was necessary to increase the district's class size to state standards (e.g. from 28:1 to an average of 31.6:1 at grades K-6). The Elk Grove community and staff also lobbied every legislator to modernize the State program. The lobbying effort resulted in the upgrading of some 1949 standards towards 1987 needs.
2.	Year-Round	Three (3) K-6 schools were placed on a year-round schedule. A 7-8 middle school is scheduled to begin in 1988-89. The year-round program is triggered by Board approved school size limits and available classroom space.
3.	Portables	The district made maximum use of lease/purchase portables to (1) provide greater flexibility, (2) comply with State guidelines, (3) qualify for additional square footage, and (4) provide non-chargeable classroom space that would not penalize the district's eligibility for State funding. Approximately 306 of the 690 instructional classrooms are portable classrooms.
4.	Hop Scotch School(s)	An innovative concept was developed to install a complete portable K-6 school at a developer owned school site in 1987, three (3) years in advance of the state funded permanent school. The portable school will be hop-scotched to another site when the permanent school is opened. A second hop-scotch school is now planned for installation by 1989.
5.	Bussing	Approximately 500 K-6 students are bussed daily from crowded schools to schools with classrooms. The bussing is triggered by school size limits and available classroom space.
6.	Adjacent School District Space	A major effort was made to lease a complete middle school from an adjacent school district. This venture was not successful as the adjacent school district eventually developed a need for the school space.
7.	Double Sessions	Double sessions were considered and rejected when it was determined that the longer school day at grades 4-6 would result in a double session that would begin at 7:00 A.M. and end at 7:16 P.M. plus a one-hour pickup/dropoff time for transportation added to each end of the day.

Figure 4
BEFORE ASKING FOR TAX DOLLARS

- WE QUALIFIED FOR STATE FUNDS
  - Increased Class Size
- WE LOBBIED TO MODERNIZE STATE PROGRAM
  - Upgraded Some Standards
- WE STARTED YEAR ROUND PROGRAMS
  - Prairie Elementary 1986-87
  - Mack Elementary 1986-87
  - Reese Elementary 1987-88
  - Rutter 7-8 1988-89
- WE MAXIMIZED USE OF "PORTABLES"
  - 306 Portables out of 690 Classrooms
- WE STARTED A "HOPSCOTCH" SCHOOL
  - No. 1 in 1987
  - No. 2 in 1989
- WE BUSED 500 STUDENTS TO RELIEVE CROWDED SCHOOLS
- WE TRIED TO LEASE ADJACENT SCHOOL DISTRICT SPACE
- WE CONSIDERED AND REJECTED DOUBLE SESSIONS
  - 7:00 a.m. to 7:16 p.m. (Grades 4-6)
  - Add 1 hour pick-up/drop-off transportation time

F. PUTTING THE TAX PLAN TOGETHER

1. Why Mello-Roos?

Mello-Roos was selected over General Obligation (G.O.) Bond for the following reasons (See Figure 5):

- Tax Boundaries.

  Mello-Roos provides Elk Grove with the flexibility of setting the tax boundaries for a selected area or districtwide. This advantage was not exercised after it was determined that we should have a districtwide special tax to solve districtwide problems.

- Tax Rates.

  Mello-Roos provided the flexibility of establishing two (2) tax rates. A maximum tax rate of $3.82 per month was established for existing homes to pay for their fair share of existing schools' improvements and other student support benefits (e.g. addition of a multipurpose room) needed to serve the existing population of students. A maximum tax rate of $9.82 per month for new homes was established to pay for their fair share of new schools, existing school expansions and improvements, and other support benefits needed to serve the growth student population.

- Furniture and Equipment.

  Mello-Roos allows the purchase of badly needed buses, furniture and equipment. These purchases are not allowed by G.O. Bonds.

- Election Reimbursement.

  Mello-Roos allows the reimbursement of (1) 1986 election charges, and (2) costs that were related to the formation of the Community Facilities District and were subsequently re-used in the 1987 election.

Figure 5

WHY MELLO ROOS?

PROVISION	MELLO ROOS	G.O. BONDS
1. TAX BOUNDARIES	FLEXIBLE	MUST BE DISTRICTWIDE
2. TAX RATES	FLEXIBLE	ASSESSED VALUE
3. BUY VEHICLES	YES	NO
4. BUY FURNITURE	YES	NO
5. BUY EQUIPMENT	YES	NO
6. 87 ELECTION REIMBURSEMENT (PASSED)	YES	YES
7. 86 ELECTION REIMBURSEMENT (FAILED)	YES	NO

F. PUTTING THE TAX PLAN TOGETHER (Continued)

2. A Coalition On Taxes (See Figure 6)

Elk Grove developed a coalition in the setting of tax rate limits. This resulted in organized support rather than organized opposition to the election. The limits were established as follows:

- A $3.82 per month limit was established for existing homes. Three (3) community opinion surveys were conducted between the two elections to assess the community's awareness of the overcrowded conditions, their perception of the district's facility needs, and finally, the tax rate that would receive the support of two-thirds of the voters. Elk Grove discovered that the community was very aware of the overcrowding conditions, was supportive of the facility improvements, and would provide 2/3 support up to a $4.00 tax rate.

- A $9.82 per month limit was established for new homes. This limit was arrived at after extensive coordination with the real estate community including major land developers, residential developers, commercial/industrial developers, and the Building Industry Association. It was finally determined that a $10.00 per month limit would reflect a fair share of the costs for the new students without impairing the buyer's ability to qualify for the purchase of a new home. Developer support for the election would turn to opposition if the tax rate exceeded $10.00 per month.

- The agricultural community was not taxed for lands used solely for agricultural purposes since there is no student impact on the school district. Each residence, however, would be taxed for its fair share since the residence could generate a student impact.

- Undeveloped properties that were zoned with a potential for higher use were assessed a single tax rate until development was actually initiated with a proposed map.

- The senior citizen was granted a 70% discount on their residence tax rate.

- The projected revenue from the proposed tax rates (in partnership with State funding) would meet the district's needs through 1995.

- The construction program insured that every existing school would receive a significant benefit from the bond issue through the addition of badly needed multipurpose rooms, libraries, site development, deferred maintenance, asbestos removal, student support space, and transportation.

- A $70 million cap was placed on the total bonds to be sold, with each bond issue limited to a 20 year amortization period. The $70 million cap was based on the future debt that could be serviced by the revenue generated from the tax rates of $3.82 per month for existing homes and $9.82 per month for new homes.

Figure 6

A COALITION ON THE BOND ISSUE

- **THREE COMMUNITY SURVEYS**
  - Aware of Overcrowding
  - Supports Need For Facilities
  - 2/3 Support up to $4.00/Month
- **REAL ESTATE COMMUNITY**
  - Land Developers
  - Residential Developers
  - Commercial/Industrial Developers
  - Support up to $10.00/Month
- **AGRICULTURAL COMMUNITY**
  - No Tax on Agricultural Land
  - Tax on Residences is Fair
- **MELLO ROOS BOND PROVISIONS**
  - Districtwide Community Facility District
  - Requires Two-Thirds Vote
  - $3.82 Per Month on Existing Homes
  - $9.82 Per Month on New Homes
  - No Tax on Agricultural Land
  - 70% Senior Discount
  - Single Tax Unit on Zoned Properties
  - Revenue Meets 10 Year Needs (1995)
  - Completes 21 New Schools
  - Improves 23 Existing Schools
  - Provides Buses & Support Facilities
  - $70 Million Cap on Bonds
  - 20 Year Bonds

F. PUTTING THE TAX PLAN TOGETHER (See Figure 7)

3. The Tax Plan Team

Once the tax rate limits and bond size limits were established, the Tax Plan Team developed a financial plan package (in partnership with State funding) to meet the district's needs through 1995. The tax plan team carried out the following key assignments:

- District Staff developed (1) a comprehensive **FACILITIES MASTER PLAN** which provided cost estimates for all identified facility, furniture and equipment needs through the year 2010, and (2) a detailed **FINANCIAL PLAN** which described the sources of funding (State Funds and Local Bond Funds) and their proposed use to meet the district's needs. These two documents are incorporated into the bond issue and serve as the authorizing documents for the expenditure of bond and tax proceeds.

- Legal General Counsel (Kronick, Moskovitz, Tiedemann & Girard) (1) provided the district with legal guidelines for the bond election to insure compliance with the Mello-Roos law, (2) highlighted all of the legal deadlines, and (3) provided specific legal opinions where needed (such as use of district funds in support of the election), and (4) provided the validating opinion to the bond underwriter at the close.

- Bond Counsel (Orrick Herrington & Sutcliffe) ensured that (1) the structure of the transaction was legally sound, (2) legal procedures were met (hearings, notices, etc.), (3) the transaction was cognizant of case law, (4) a careful analysis of the tax plan was made, and (5) a final legal opinion was issued along with the proper closing documents.

- The Assessment Engineer (Shilts Engineering) (1) developed the boundary map, (2) analyzed the tax base, (3) developed the tax formula, and (4) developed the final tax report that was submitted to the County.

- The Bond Underwriter (Dean Witter Reynolds, Inc.) (1) performed a financial analysis, (2) structured the financial package, (3) prepared the official statement, (4) secured a bond rating, and (5) sold the bonds.

- The Financial Advisor (Cranston Securities) (1) provided an independent and objective third party opinion, (2) analyzed the financial plan, (3) analyzed the structure of the transactions, and (4) assisted with the Public Sale procedures.

- The FPPC Consultant (Olson, Connelly & Hagel-Lance Olson, Attorney At Law) insured that all Fair Political Practice Commission (FPPC) requirements were met for the reporting of election income and expenditures.

Figure 7

THE TAX PLAN TEAM

TEAM MEMBER	RESPONSIBILITIES
• District Staff	• Develops Facility Master • Develops Financial Plan
• Legal Counsel	• Provides Legal Election Guidelines • Highlights Legal Deadlines • Provides Specific Opinions
• Bond Counsel	• Assures Transaction is Legal • Meets Legal Procedures • Analyzes Tax Plan • Provides Case Law Experience • Delivers Final Legal Opinion • Delivers Closing Documents
• Assessment Engineer	• Prepares Boundary Map • Analyzes Tax Base • Develops Tax Formula • Develops Tax Report
• Bond Underwriter	• Performs Financial Analysis • Structures Financial Package • Secures Bond Rating • Sells the Bonds
• Financial Advisor	• Provides 3rd Party Opinion • Analyzes Financial Plan • Analyzes Transaction Structure • Assists With Public Sale
• FPPC Consultant	• Assures FPPC Compliance

G. WHAT WE LEARNED FROM THE 1986 ELECTION (See Figure 8)

1. Comparing The Elections

A comparison of the two elections shows that the 1987 election increased the "Yes" votes from 6,998 to 11,261 votes, while the "No" votes decreased slightly from 3,794 to 3,787 votes. Voter turnout was increased from 10,792 to 15,048 voters.

2. The 1986 Election

- The 1986 Campaign was low profile. Based on the advice of three (3) independent consultants, the district (1) determined that a special election was preferred over a general election to the seek the informed voter, (2) expected an 18% turnout for the special election with a 50/50 split vote (3) assumed that an increased turnout of 27% (with mostly yes votes) would produce the 2/3 margin, (4) implemented a low publicity campaign, and (5) directed its communications primarily at identified supporters. This produced a 26.9% turnout.

- The low profile campaign resulted in (1) no communications with the strong no vote communities (senior citizens and mobile home parks), and (2) limited communications with the undecided voter who would vote yes if they were properly informed of the need.

- Many zoned property owners voted against Measure A because their property was taxed against its potential higher use although the property was not under development.

- 5800 identified supporters failed to vote.

- The computer database provided by an out of town data processing contracting service did not provide timely and accurate information for the campaign.

3. The 1987 Election

- The 1987 Campaign was high profile. It called for (1) a special election again, (2) a larger voter turnout than 1986, (3) a wide open publicity campaign, (4) a heavy involvement in community activities, and (5) direct communications to all voters. This produced a 35.3% turnout.

- Targeted mailings were made to all voters, identified supporters who did not vote, community service clubs, businesses, and the media. A Speakers Bureau contacted and spoke to all senior centers, mobile home parks, community service clubs, district staff meeting, and PTA groups.

- The zoned property tax was changed to one (1) single tax unit until a map is filed to develop the property.

- A special effort was made to get the yes non-voters to the polls.

- An inhouse computer database was established which integrated the Voter Registrar's files with our Student Information System file.

- The voter precincts were reduced from 72 precincts to 38 precincts with a majority of the precincts located in elementary schools.

Figure 8

COMPARING THE ELECTIONS

SUBJECT	1986	1987
• ELECTION DATA		
- YES VOTES	6,998 (64.8%)	11,261 (74.8%)
- NO VOTES	3,794 (35.2%)	3,787 (25.2%)
- TOTAL VOTES	10,792 (100%)	15,048 (100%)
- REGISTERED VOTERS	40,118	42,668
- VOTER TURNOUT	26.9%	35.3%
• PUBLICITY	Low Profile	High Profile
• TARGETED MAILINGS	Identified Supporters	All Voters Supportive Non-Voters
• ZONED PROPERTY TAX	40% of Maximum Potential	One (1) Tax Unit Until Map is filed
• COMPUTER DATABASE	Contracted Services	In-House Computer
• VOTER PRECINCTS	72	38

H. ORGANIZING THE 1987 ELECTION

When the Elk Grove Board approved the second bond election, they committed themselves to (1) a united effort, (2) educate all segments of the community, (3) get the 5800 identified supporters who didn't vote in the first election to the polls, and (4) win over the hard core "no" voters wherever possible.

The following key players contributed to a successful election (See Figure 9):

1. The School Board decided on a pro-active campaign, committed funds to a high profile effort, appointed an effective Steering Committee, assigned three board members to support the Steering Committee, hired a campaign consultant, avoided a "win at all costs" type of campaign, participated in many community presentations, and made a personal effort to convert identified no voters.

2. The Steering Committee consisted of ten respected community members with high name recognition. Committee members represented the geographic, demographic, ethnic and political make-up of the of the community.

   This committee planned the campaign strategy, coordinated fundraising activities, provided day-to-day direction to the election consultant, approved all letters, flyers, cards and media material, and coordinated the use of volunteers.

3. The Election Consultant conducted campaign research and developed high profile campaign strategies for approval by the election committee. This included community surveys, campaign strategies, preparation of campaign materials, fundraising strategies, vote by mail campaign, advice on election presentation materials, and general assistance with day-to-day campaign activities.

   It should be noted that a successful campaign must combine the political know-how of a professional consultant with the local Steering Committee's knowledge of the community, its makeup, its concerns, and areas of sensitivity.

4. The School Principals were responsible for (1) appointing two chairpersons from their school, (2) recruiting volunteers from their communities, and (3) promoting all fund raisers, tickets sales, garage sales, car washes and other school/community election activities,

   Precincts were tied closely to the attendance areas. Analysis of the first election showed how effective the principals were in getting voter turnout for the first election. The voter turnout data heightened principal accountability and encouraged competition. This resulted in an overall increase of voter turnout by 10% in the 1987 election.

Figure 9
THE CAMPAIGN TEAM

- THE SCHOOL BOARD
  - United Effort
  - Educate All Voters
  - Increased Yes Vote
  - Convert No Votes
  - Committee
  - Direction
  - Budget

- THE STEERING COMMITTEE
  - Planning
  - Strategy
  - Organization
  - Fund Raising
  - Volunteers

- THE ELECTION CONSULTANT
  - Strategy
  - Design
  - Coordination

- THE PRINCIPALS
  - Volunteers
  - In-School Organization
  - Community Involvement
  - Promoting Events

- THE VOLUNTEERS
  - Phone Bank
  - Resources
  - Letters
  - Staff Fund Raisers

H. ORGANIZING THE 1987 ELECTION (Continued)

5. Volunteers

During the campaign 1,100 school and community members worked on behalf of the bond campaign. These volunteers supported the 101 activities that are part of a campaign, such as:

- Phone Banks
- Contributions
- Attending Rallies
- Hosting Meetings
- Contacting Mobile Homeowners
- Contacting Seniors
- Garage Sales
- Car Washes
- Installing Lawn Signs
- Provided Transportation
- Letters Of Support
- Pro-Measure Picket Lines
- Selling Raffle Tickets
- Wearing Sign Boards
- Fundraising
- Door-To-Door Canvasing
- Voter Registration
- Absentee Ballots
- Precinct Work
- Get Out The Vote

The level of volunteer effort in the Elk Grove election was well beyond the expectations of the Board and Steering Committee. The campaign consultant was overwhelmed at the willingness of the district's community to rise to the task.

6. Fundraising (See Figure 10)

The building and development community was targeted as a major donor. Three leading members representing land development, commercial development, and residential development accepted the responsibility of raising a given amount from each of their respective development communities. This raised the bulk of the campaign budget.

Where appropriate, special presentations were made to statewide and local organizations (e.g. State Board of Realtors) which resulted in contributions to the campaign.

Major contractors and suppliers of products and services to the district were solicited through letters and phone calls. The response was excellent.

A general solicitation letter, typical of political campaign letters with endorsement cards and a financial appeal, went to the community. This generated some income but the principal benefit was the cadre of volunteers and the location for lawn signs and coffee klatches.

District staff contributed money as well as energy and time to the campaign.

The remaining fundraising activities were designed more as PR media events with fundraising as a bonus. This included garage sales, car washes, community barbecue, and raffle tickets.

Figure 10
FUND RAISING

- DEVELOP FUNDRAISING STRATEGIES
  - Money Raising
  - Public Relations Events
- IDENTIFY DONOR SOURCES
  - Land Developers
  - Residential Developers
  - Commercial Developers
  - Business
  - Supporters
  - Agencies
  - District Vendors
  - Organizations
- ESTABLISH FUNDRAISING TEAMS
  - Land/Residential/Commercial Developers
  - Community Fundraising
  - District Vendor Fundraising
- PUBLIC RELATIONS FUNDRAISER EVENTS
  - Barbecue - Dance
  - Garage Sales
  - Car Washes
  - Raffle Tickets
  - T-Shirts & Caps

I. GETTING THE MESSAGE ACROSS (See Figure 11)

1. A Good Database

The 1986 election provided the district with a good database which told us which of our identified yes/no/undecided voters indeed voted. It also identified voters that we had failed to contact in the first election.

The 1986 election was plagued by the lack of timely and accurate information from a contracted data processing service located out of town. The 1987 election corrected this deficiency by establishing a database in the district's own computer. The database integrated the Registrar of Voter's computer file with the district's student information system. This provided the district with the capability of producing a variety of lists and address labels virtually on a moment's notice. This proved invaluable to the campaign's ability to select target populations for mailings and telephone followup.

2. Phone Banks

The phone banks were manned by 300 volunteers who did an excellent job of identifying yes voters, no voters, undecided voters, absentee ballots, campaign volunteers, contributions, lawn sign volunteers, registered voters, and finally, getting out the vote on election day.

3. Personal Contacts

- Identified no voters received a personal call from Board members or the administration in an effort to make a 2-for-1 conversion. In many instances the no vote was converted to a yes vote because the voter was misinformed or uninformed about the purpose of the bond issue and the actual cost to the taxpayer.

- Identified undecided voters were contacted by parent-teacher teams in an effort to convert them to yes votes. These contacts proved to be very fruitful with a high conversion rate, especially among parents of children in school.

- Identified supporters who did not vote received extra attention and care. Special phone bank calls and personal contacts were made to encourage them to vote by mail. Prior to election day, the school site teams were provided lists of all these supporters for the purpose of a final personal contact on election day.

4. Lawn Signs

The election committee was informed that a lawn sign would secure approximately 1.4 votes per household. Through its volunteer recruitment meetings and phone bank contacts, Elk Grove gained approval for and installed 3,000 lawn signs two weeks before the election. The overnight appearance of a sea of lawn signs was impressive indeed.

Figure 11
GETTING THE MESSAGE ACROSS

- A GOOD DATABASE
  - Yes Voters
  - No Voters
  - Undecided Voters
  - Voters who were not contacted
  - Supporters who didn't vote

- PHONE BANKS
  - Identify yes/no/undecided voters
  - Absentee Ballots
  - Volunteers
  - Contributions
  - Lawn Signs
  - Garage Sales
  - Get Out The Vote

- PERSONAL CONTACTS
  - No Voters
  - Undecided Voters
  - Supporters who did not vote

- LAWN SIGNS

- COMMUNITY INVOLVEMENT
  - Volunteers
  - Garage Sales
  - Car Washes
  - Barbecue & Dance
  - Fund Raisers

I. GETTING THE MESSAGE ACROSS (Continued)

5. Community Involvement

The election committee involved the community heavily in campaign and fundraising activities such as:

- Garage sales were held in school multi-purpose rooms and brought people to schools and made community members aware of the campaign. Although they were done for the PR benefit, garage sales were a financial success. Volunteers wearing Measure A T-Shirts and caps served refreshments and handed out campaign literature.

- Car washes got dads involved (on a voluntary basis) in the campaign. Car washes were done by school clubs and groups at high visibility locations and earnings were split with the group.

- The western style barbecue-dance was a financial success and unifying event. North and south, urban and rural, young and old from schools throughout the 320 square mile area came together for a common cause. Raffle tickets were sold before and during the barbecue.

- Administrators and Board members served the buffet style dinner. It was a quality event that has become an on-going spring activity.

6. Targeted Mailings (See Figure 12)

Targeted mailings were made to all voters, both for and against the bond measure.

- All voters received general publicity mailings, fact sheets, and letters of support from organizations such as the taxpayers league and other recognized civic leaders.

- Identified No Voters received special mailers from former no voters who now supported the bond measure.

- Identified Supporters Who Did Not Vote received a special mailer from a supporter who did not vote expressing dismay that the previous election had failed because a few supportive voters did not vote (5,800 identified supporters did not vote in 1986).

- Undecided Voters received a special mailer from both supporters of the measure and a non-supporter now converted to support the bond measure.

- Senior Citizens received a special mailer from a respected retiree in the community.

- Mobile Homeowners received special mailers from mobile homeowners and mobile home park owners who were supportive of the bond measure.

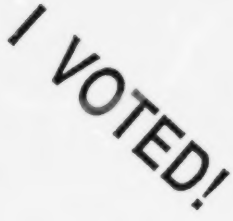
- Republicans received a special mailer from a well known and respected Republican civic leader in support of the bond measure.

7. Media Coverage

The district's Director of Communications established open lines of communication with all of the local press (Elk Grove Citizen, Sacramento Bee, Sacramento Union), radio and television stations. This resulted in excellent media coverage of the Measure A campaign.

Figure 12

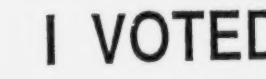
TARGETED MAILINGS



Since the Elk Grove Unified School Board has been willing to change their position.....then so will I. This time I'm supporting them. Here's why. . . . . .

Dear Mobile Home Resident
We are in support of Measure A. For senior citizens, your rent will reflect the discount...

Like you, my wife and I are retired. Unfortunately, many older voters opposed Measure A. Many of our fellow retired voters did not realize the Board had included a substantial Senior Citizen's Discount.



Dear Fellow Republican
The tax rate has been lowered...
The tax rate has been equalized...
It is a fair and reasonable bond measure... Join me in voting "Yes on Measure A"....

You and I are in an embarrassing position! We agreed to support Measure A. I had every intention of voting, but on election day I forgot...so did 4,000 others. Well, we've got another chance.....

Dear Friend
Last year the mobile home owners were given bad information! We think Measure A is a good deal.

THE SACRAMENTO COUNTY TAXPAYER'S LEAGUE STRONGLY SUPPORTS MEASURE A.

J. GETTING OUT THE VOTE (See Figure 13)

1. Voter Registration

A major effort was made to register (to vote) all identified supporters and all parents that had children in school.

2. Absentee Ballots

Identified supporters were encouraged to vote by mail. A special emphasis was placed on supporters who did not vote in the 1986 election through the use of an absentee ballot phone banks and door-to-door solicitation teams.

3. Consolidation Of Precincts

In an effort to reduce costs and improve voter turnout for the special election, a request was made to consolidate the 72 precincts into 38 precincts and to make elementary schools available as precincts. Special care was taken to insure that an adequate number of polling stations were located at each precinct to handle the voter turnout.

4. Precinct Change Reminders

A special phone bank (the night before the election) reminded all supporters of their revised polling location if they had been shifted from a neighborhood precinct to a school site precinct.

5. School Curriculum

As a part of bicentennial activities celebration, the school curriculum stressed (1) the importance of a person's responsibility to exercise their right to vote, and (2) that "voting is choosing".

6. School Open House

Open House was scheduled on election day to improve voter turnout. Special care was taken to insure that all campaign materials were removed from the school site and replaced with materials that reminded people to vote without advocating the passage of Measure A.

7. Poll Watch

Volunteers conducted a poll watch at each precinct at 2:00 P.M. and 4:00 P.M. on election day. Lists of voters who had not yet voted were returned to the phone banks.

8. G.O.T.V. Phone Banks

On election day, the phone banks called all supporters who had not yet voted from 4:00 P.M. to the closing of the polls at 8:00 P.M. The phone banks also reminded the supporter of their precinct location.

9. "I VOTED" Labels

Voters exiting from the polling precinct areas were given a shirt-pocket stick-on "I VOTED" name tag. This name tag circulated throughout the Open House night and reminded other registered voters to vote.

Figure 13
GETTING OUT THE VOTE

- VOTER REGISTRATION
  - Parents
  - Identified Supporters
- ABSENTEE BALLOTS
  - Focus on Supporter Who Didn't Vote
- CONSOLIDATION OF PRECINCTS
  - Reduce Costs
  - 72 to 38 Precincts
  - Located in Schools
- PRECINCT CHANGE REMINDERS
  - Reminded Supporters on Election Day
- SCHOOL CURRICULUM
  - Bicentennial Celebration
  - Citizens Responsibility to Vote
  - Voting is Choosing
- SCHOOL OPEN HOUSE
  - Election Day
  - Remove Pro Measure Materials
  - Remember to Vote Materials
- POLL WATCHES
  - 2:00 P.M. & 4:00 P.M.
  - Non Voter List to Phone Banks
- GOTV PHONE BANKS
  - Reminder to Vote
  - Reminder on Precinct Location
- "I VOTED" LABELS

K. CONCLUSIONS (See Figure 14)

The Elk Grove experience suggests the following:

1. The Board of Education must be unified in their commitment and resolve to withstand the pressures of a bond election.

2. The chain of command must be strong to implement campaign strategies. (Board/Steering Committee/Administration/Principals/Volunteers).

3. Exhaust all options before calling for an election.

4. The FACILITY MASTER PLAN and FINANCIAL PLAN must be comprehensive to provide proper authorization for all of your needs.

5. Use State funding to the maximum if your district can qualify. (Be prepared to accept delays in State Funding.)

6. Use local funding as a supplement to State funding.

7. Use Mello-Roos if you need flexibility to meet your facility, furniture, equipment, and vehicle needs.

8. Community and developer input is essential for the setting of priorities and tax rates.

9. Use a qualified team of experts to construct the bond election financial package.

10. A good database enhances your ability to communicate effectively with registered voters, parents of students, and target population.

11. A special election provides a better opportunity to seek out the informed voter.

12. A high profile campaign resulted in excellent communications with the voting community and the media.

13. Heavy community involvement in the campaign is essential toward getting the message across.

14. The supporters who didn't vote (the first time) requires tender loving care to get them to the polls.

15. The consolidation of precincts into the schools improved voter turnout.

16. The School Open House on election day improved the voter turnout.

17. AND IF YOU GET THIS FAR.....

NO WORRIES!

Figure 14
SUMMARY

- BOARD COMMITMENT AND RESOLVE
- GOOD CHAIN OF COMMAND
- EXHAUST ALL OPTIONS
- THOROUGH FACILITY MASTER PLAN/FINANCIAL PLAN
- MAXIMIZE STATE FUNDING
- USE LOCAL FUNDING
  - Supplement State Funding
  - Fund Needs Not Met By State
- MELLO ROOS PROVIDES FLEXIBILITY
  - Boundaries & Tax Rates
  - Vehicles, Furniture and Equipment
  - Reimbursements
- SEEK COMMUNITY AND DEVELOPER INPUT
- USE A QUALIFIED TAX PLAN TEAM
- DEVELOP A GOOD DATABASE
- SPECIAL ELECTION / INFORMED VOTER
- HIGH PROFILE / GOOD COMMUNICATIONS
- INVOLVE THE COMMUNITY
- CONSOLIDATION OF PRECINCTS
- THE SCHOOL OPEN HOUSE
- GET OUT THE VOTE
- BIRDDOG SUPPORTERS WHO DIDN'T VOTE
- AND IF YOU GET THIS FAR. . . . . .

NO WORRIES!